

June 2026 OC HMIS User Meeting

211

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Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. 2026 Agency Audits
3. Data Element Highlight: Monthly Income and Sources
4. Additional Agency Access
5. Duplicate Client Profiles
6. Behavioral Health Services Act (BHSA) Compliance
7. Project Performance Report - Goal 10 Overview
8. Project Performance Report
9. Emergency Transfer Plan Reporting
10. Training and Resources
11. CES - City Prior and Current Living Situation
12. Survey
13. Q&A
14. Office Hours

Meeting materials and recording will be available on the [OC HMIS website](#)



Q&A





To better organize questions the HMIS Help Desk receives during the meeting, our Team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the meeting.

Agency specific questions is best supported through a HMIS Help Desk ticket submission, so our Team is able to further investigate and provide assistance for your request.

HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule																	
 																	
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March	Light Blue	Light Blue								Light Blue	Light Blue	Light Blue
	Longitudinal Systems Analysis (LSA)	October	December	January	April	Yellow									Yellow	Yellow	Yellow
	Housing Inventory Count (HIC)	January	February	April	May	Pink	Pink	Pink	Pink								
	Sheltered Point in Time (PIT)	January	February	April	May	Green	Green	Green	Green								
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February	Orange	Orange				Orange	Orange	Orange				Orange
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January	Grey				Grey	Grey	Grey				Grey	Grey
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December				Purple	Purple	Purple				Purple	Purple	Purple
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November			Cyan	Cyan	Cyan				Cyan	Cyan	Cyan	
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September	Green	Green	Green			Green	Green	Green				
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October		Orange	Orange	Orange				Orange	Orange	Orange		
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November	Grey	Grey		Grey	Grey		Grey	Grey		Grey	Grey	
	Agency Audits	June	Specific to each agency	n/a	n/a							Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
HMIS User Recertifications	July	August	n/a	n/a								Pink	Pink				
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00AM	n/a	n/a	n/a	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a		Purple			Purple			Purple			Purple	



HMIS Participating Agencies Schedule



HMIS Participating Agencies Schedule

June

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Transitional Housing
- Agency Audits Begin

July

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Homelessness Prevention
- Agency Audits
- HMIS User Recertifications

August

- Project Performance Reports
 - Emergency Shelter
 - Street Outreach
 - Homelessness Prevention
- Agency Audits
- HMIS User Recertifications

2026 Agency Audits

- The HMIS Helpdesk Team will begin conducting agency audits for 2026 this month.
- We will reach out to your agency 3 weeks before the available audit meeting dates so you have a few options to schedule the audit and you have time to prepare for the audit.
- Please be on the lookout for our email to schedule your Agency Audit in June. We will be scheduling audits throughout the summer and fall months to accommodate all the agencies.



Data Element Highlight: Monthly Income and Sources

[4.02 Income and Sources](#)

Data Collected About: Head of Household and Adults

Project Type: All HMIS Project Types

Funder: Component - All HMIS Project Types

Collection Point: Project Start, Update, Annual Assessment, and Project Exit

This Data Element is collected to determine whether households are accessing all income sources for which they are eligible and to allow for analyzing any changes to income between project start and exit.

For more information please refer to the following knowledge base article, [Income and Sources](#)

Jessica Harkonnen

PROFILE HISTORY **PROGRAMS** ASSESSMENTS FILES SERVICES CONTACT LOCATION

MONTHLY INCOME AND SOURCES

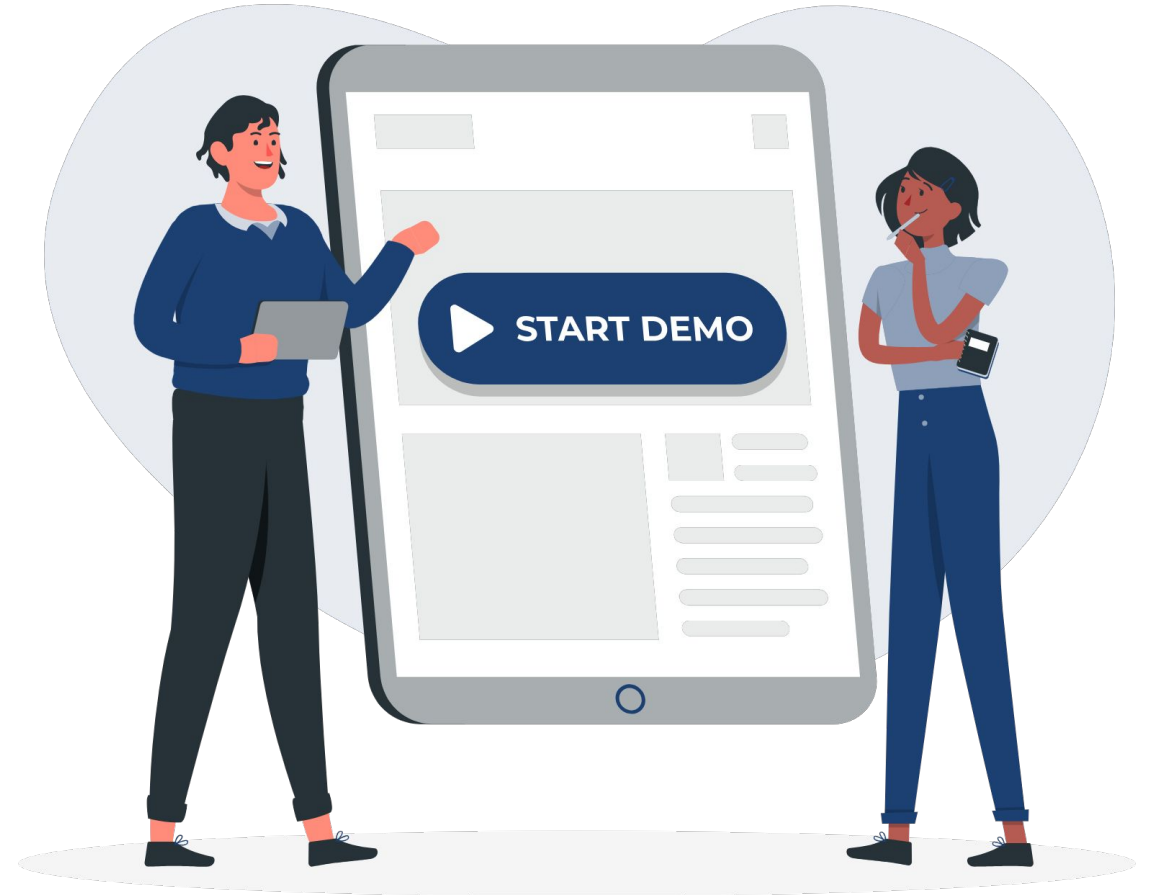
Income from Any Source	Yes	
Earned Income	<input type="checkbox"/>	
Unemployment Insurance	<input checked="" type="checkbox"/>	Amount 250.00
Supplemental Security Income (SSI)	<input type="checkbox"/>	
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>	
VA Service-Connected Disability Compensation	<input type="checkbox"/>	
VA Non-Service Connected Disability Pension	<input type="checkbox"/>	
Private Disability Insurance	<input type="checkbox"/>	
Worker's Compensation	<input type="checkbox"/>	

Data Element Highlight: Monthly Income and Sources

Common Errors

Confusion between SSI, SSDI and Retirement Income from Social Security	<p>Supplemental Security Income (SSI) disability benefits are only available to low-income individuals who have either never worked or who haven't earned enough work credits to qualify for SSDI.</p> <p>Social Security Disability Insurance (SSDI) is available to workers who have worked and accumulated a sufficient number of work credits but they are unable to work due to a medical condition.</p> <p>Retirement Income from Social Security is available to workers, employers and the self-employed who pay for the benefits with their Social Security taxes from their working income.</p>
General Assistance listed as Other income	<p>General Assistance (also called General Relief) is a cash assistance program funded by the County of Orange. It provides temporary cash aid to eligible adult lawful residents who do not have custody of any minor children and do not qualify for Federal or State funded cash aid programs.</p> <p>Use the General Assistance field to report General Assistance or General Relief.</p>
No income entered as Other income \$0	<p>Other Income is only for sources of income not listed. If the client has no income, use the "No" response for the field Income from any source.</p> <p>Do not use this field to indicate the client has no income (placing \$0 in the field).</p>

Data Element Highlight: Monthly Income and Sources Demo



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Additional Agency Access

When users are given access to HMIS, they are set-up with a Primary Agency affiliation that identifies them as staff employed by that agency.

In some cases users need access to projects at agencies that are different from their Primary Agency (access to CES, or users at agencies that are sub-recipients of grants managed by another agency).

To be given access to an additional agency, the agency that manages the project the user needs access to must submit the [HMIS Account Update & Testing Form](#) to request access for that user.



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Additional Agency Access

County of Orange Additional Agency Access

Before CES access can be requested the user MUST complete the CES module from the [HMIS Training Courses site](#).

The Agency Administrator at the staff's agency must submit the [HMIS Account Update & Testing Form](#) to request the County of Orange additional agency access.



Graphic by: <https://storyset.com/online>

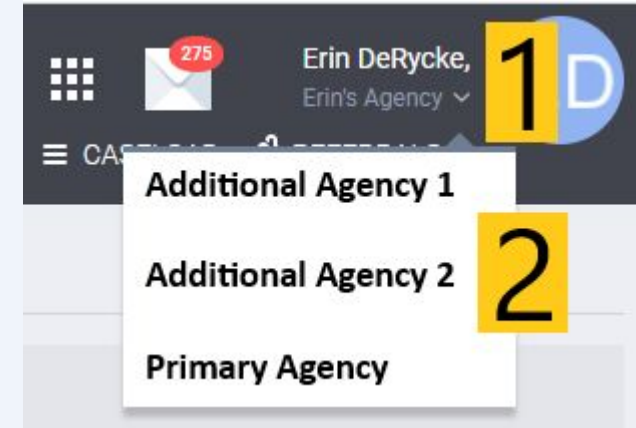
Additional Agency Access

Once the user's account has been updated with additional agency access, the additional agency will appear under their agency dropdown in Clarity.

When the user first logs in the dropdown will default to their Primary Agency.

To enter data or run reports under the additional agency, the user must select the agency dropdown and click on the agency view.

KB: [Additional Agency Access](#)



Duplicate Client Profiles

Users are advised to [search HMIS](#) to verify if there's already an existing profile for the client before creating a new HMIS record. A client may end up with multiple records if subsequent staff or agencies create their own record without searching for an existing one.

If a duplicate profile is discovered the Agency Administrator should submit a [Help Desk ticket](#) requesting a Client Record Merge (please identify the primary and duplicate UIDs); **do not disclose any PPI such the last four of the SSN or DOBs.**

Agency Administrators can review the [Duplicate Client Records Knowledge Base Article](#) for guidance on submitting de-duplication requests to the Help Desk.



Graphic by: <https://storyset.com/online>

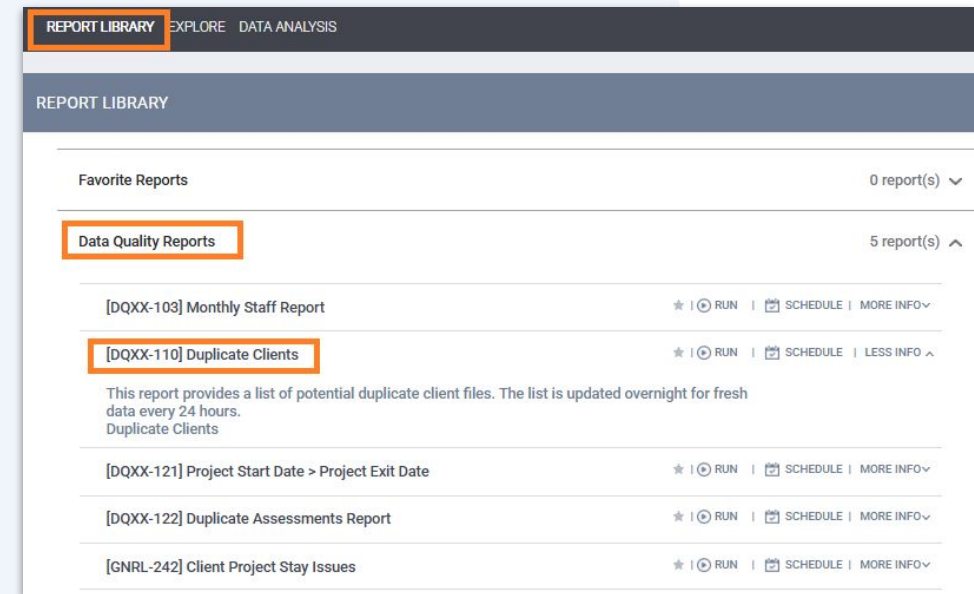
Duplicate Client Profiles

A process to help reduce duplicate HMIS records is to run the **Duplicate Clients Report [DQXX-110]** which generates a list of potential duplicate client records.

The system looks at the following fields to determine if the records are an exact match:

- Personal Identifying Information (PII) fields such as Name, Social Security Number, Date of Birth
- Data Quality (DQ) fields such as: Quality of Name, Quality of SSN, Quality of DOB

Agency Administrators are encouraged to run this report on a quarterly basis.



Duplicate Client Profiles

Before reaching out to the Help Desk with a de-duplication request, Agency Admins must confirm the records represent the same individual:

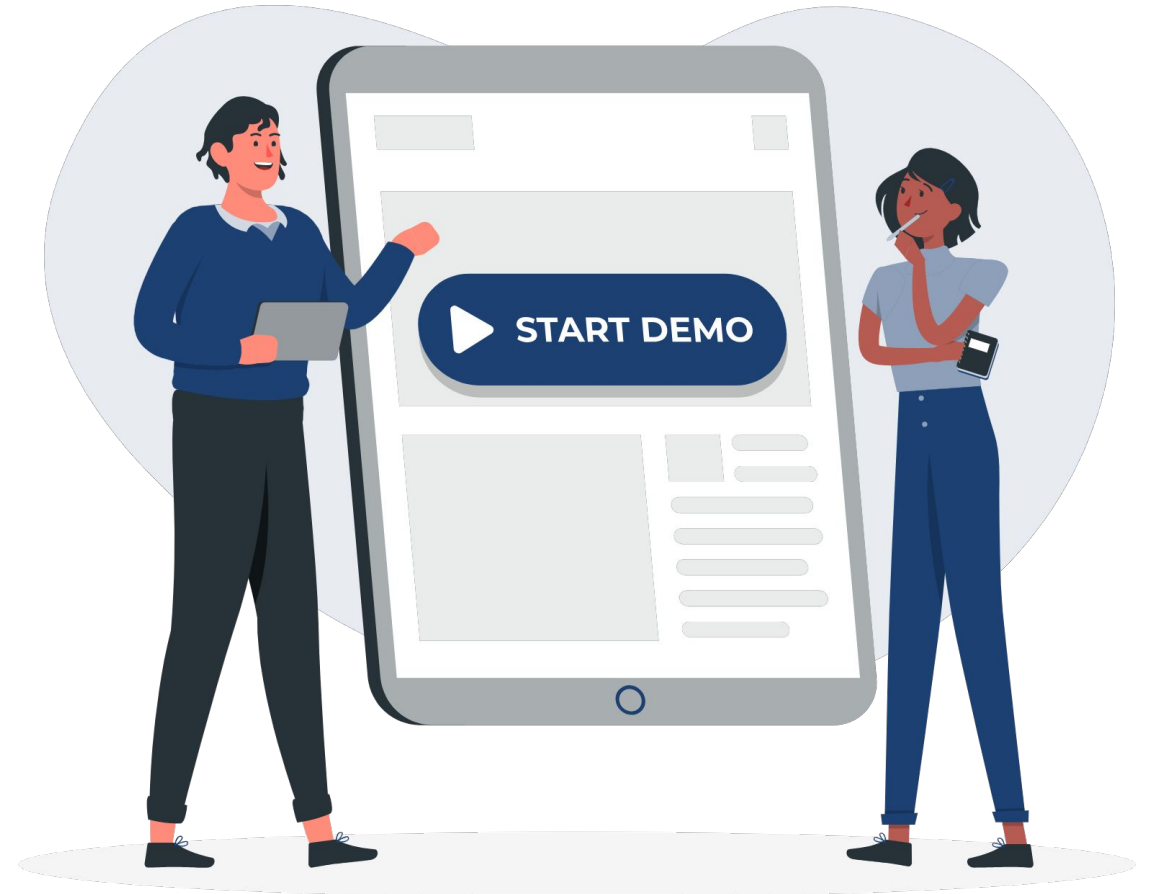
Complete one or more of the following steps:

1. Review and compare profile screen identifying information.
2. Review identifying documentation available in both records.
3. Reach out to other agencies/staff working with the client and confirm records match the same individual.



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Duplicate Client Profiles Demo



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Behavioral Health Services Act Compliance

BHSA requires all programs supported by Housing Intervention funds enter data into HMIS.

Existing Projects: All currently operating projects that will be transferred to BHSA-H.I. funding must be set up in HMIS with data entered for all current clients on or before June 30, 2026 – whether they have previously participated in HMIS.

New Projects: For projects commencing on or after July 1, 2026, HMIS data entry is required beginning on the first day the first individual or household is served by the project.

HMIS Project Build for BHSA Office Hours

- Wednesday, June 10 | 1 - 2:30 p.m., [register here](#)
- Friday, June 12 | 10 - 11:30 a.m., [register here](#)



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Goal 10: Ensure Clients Do Not Fall Back Into Homelessness after being Housed

Goal: Ensure that clients are not returning to the homeless system after they have been placed in permanent housing destinations. For Homelessness Prevention projects, ensure that clients do not enter the homeless system after exiting to a permanent housing destination.

- **Applicable Project Types & Targets:**
 - Street Outreach: $\leq 10\%$
 - Emergency Shelter: $\leq 10\%$
 - Transitional Housing: $\leq 7\%$
 - Rapid Re-Housing: $\leq 7\%$
 - Permanent Supportive Housing (PSH) - Other Permanent Housing (OPH): $\leq 7\%$
 - Homelessness Prevention: $\leq 10\%$
- **Universe:** Clients that exited the project to a permanent housing destination during the reporting period.

$$\text{Goal 10} = \frac{\text{Leavers placed in permanent housing who returned to homeless system}}{\text{Total leavers exited to permanent housing}}$$

Making Corrections for Goal 10

Programs Project Type Code	Clients Client ID	Enrollments Enrollments Enrollments	Enrollments Household ID	Enrollments Project Start Date	Enrollments Project Exit Date	Update/Exit Screen Destination	Clients Veteran Status	Entry Screen Age at Project Start	Entry Screen Chronically Homeless at Project Start - Individual	PH Exit?	Exit During Reporting Period	Returning Entry Date	Project Type Returned to	Days between PH Exit and new entry	Days between PH Exit and New Entry Categories	Project Type Path	Return to homelessness	Enrollments Count Children	Enrollments Count Adults	Enrollments Total Clients	Enrollments Household Type
Emergency	2081	228118	198161	3/14/2023	7/5/2024	Rental by	No	28	Yes	Yes PH Exit	Yes	2/14/2025	Street Out	224	6 Months	Emergency Shelter – Entry Exit to Street Outreach	Yes	0	1	1	Household without Children
Emergency	3453	240455	209382	4/21/2023	1/11/2024	Rental by	No	63	Yes	Yes PH Exit	Yes	1/31/2024	PH – Hous	20	Within 6 M	Emergency Shelter – Entry Exit to PH – Housing with Services (no disabili	Yes	0	1	1	Household without Children
Emergency	3831	348839	310114	3/18/2025	4/3/2025	Staying or	No	63	Yes	Yes PH Exit	Yes	4/23/2025	Street Out	20	Within 6 M	Emergency Shelter – Entry Exit to Street Outreach	Yes	0	2	2	Household without Children
Emergency	3952	238668	207837	4/12/2023	9/1/2023	Staying or	No	58	No	Yes PH Exit	Yes	12/1/2023	Emergency	91	Within 6 M	Emergency Shelter – Entry Exit to Emergency Shelter – Night-by-Night	Yes	0	1	1	Household without Children
Emergency	26	237064	206383	3/29/2023	7/22/2023	No exit in	No	33	No	No PH Exit	Yes				One to Tw		No	0	1	1	Household without Children
Emergency	66	340072	301692	1/26/2025	4/20/2025	No exit in	No	62	No	No PH Exit	Yes	4/24/2025	Street Out	4	One to Tw		No	0	1	1	Household without Children
Emergency	128	324914	287467	10/18/2024			No	20	No	No PH Exit	No				One to Tw		No	0	1	1	Household without Children
Emergency	168	254012	221773	7/20/2023	9/14/2023	Place not	No	55	Yes	No PH Exit	Yes	10/31/2023	Street Out	47	One to Tw		No	0	1	1	Household without Children
Emergency	206	250794	218749	6/28/2023	8/7/2023	No exit in	No	44	Yes	No PH Exit	Yes	6/28/2023	Street Out	-40	One to Tw		No	0	1	1	Household without Children
Emergency	206	309775	273045	7/24/2024	8/1/2024	No exit in	No	45	Yes	No PH Exit	Yes	9/28/2024	Street Out	58	One to Tw		No	0	1	1	Household without Children
Emergency	206	346253	307616	2/28/2025			No	46	Yes	No PH Exit	No				One to Tw		No	0	1	1	Household without Children

- Review the Returns to Homelessness Column for clients with a “Yes”. Review clients’ Project Start Dates, Project Exit Dates, and Housing Move-In Dates and update if incorrect.
- Review for any overlapping enrollments that need to be fixed.
- Review clients’ Destinations and update if incorrect.
- Review the Enrollments Household Type column to verify that each client has the correct Household Type. Clients highlighted in yellow (N/A) need to be corrected in HMIS, as they are displaying an incorrect household type.

Goal 10: Project Start Date & Exit Date

Project Type	<u>Project Start Date in HMIS</u>	<u>Project Exit Date in HMIS</u>
Street Outreach	Date of first contact with the client.	ES/TH referral: the date the client enrolled into ES/TH. PSH-OPH referral: the housing move-in date in the PSH project.
Emergency Shelter	Night the client first stayed in the shelter.	The last day of continuous stay in the project before the client transfers to another residential project.
Transitional Housing	Date the client moves into the residential project.	
PSH-OPH	Date the client was admitted into the project. Admitted meaning all three below are met. The client: <ol style="list-style-type: none"> 1. Meets criteria for admission. 2. Indicates desire to be housed in the project. 3. Able to access services & housing through the project 	The last day the client receives rental assistance or supportive services or is provided rental assistance.
Rapid Re-Housing		
Homelessness Prevention	Date client first began working with the project.	The last day a service was provided.

Goal 10: Housing Move-In Date

- Records the date a client or household physically moves into a unit after being enrolled in a Permanent Housing (PSH, OPH, or RRH) project.
- Entered on the Head of Household's enrollment screen and must be updated when the client or household moves into a unit.
- When reviewing housing move-in dates for PPR corrections, ensure that it occurs either on or between the project start date and project exit date.

Additional information can be found in the [Housing Move-In Date](#) KB.

Project Performance Report (PPR)

The Transitional Housing (TH) PPRs will be published on our website in the upcoming weeks.

Current and past PPRs can be found on the [Orange County HMIS](#) website, by navigating to: Reports > [Project Performance Reports](#)

Corrections for the Emergency Shelter (ES) PPR draft data will be uploaded into Dropbox this week.

The [Project Performance Overview](#) is a helpful document that provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



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Emergency Transfer Plan

Beginning in the fall, HUD will require agencies with ESG-funded projects to implement an *Emergency Transfer Plan* (ETP).

ETPs are written policies that define the process victims of domestic violence, dating violence, sexual assault, and stalking can take to transfer from an unsafe housing unit to a new, safer housing unit.

Reporting will be conducted through the [Sage HMIS Reporting Repository](#), and ESG recipients will provide information about their ETPs in their CAPER submissions.

[HUD Form 5384](#) outlines all the relevant reporting information for ESG recipients



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Training and Resources

HMIS Data Quality Training:

The OC HMIS Team will be hosting a *Critical Dates and Overlapping Enrollments* data quality training webinar on:

Friday, June 19th @1:00PM

[Click here](#) to join!

Meeting ID: 815 9606 2734

Registration is not required

Please review the [OC HMIS Calendar](#) to find upcoming HMIS meeting and training details.



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Meetings and Resources

Agency Admin Resources:

The meeting materials for our *Agency Administrator Training* webinar can be found on the OC HMIS website by navigating to:

[HMIS Help](#) > [HMIS Recorded Trainings](#)

HUD Manuals:

- [CoC Program HMIS Manual](#)
- [ESG Program HMIS Manual](#)
- [HMIS Comparable Database Manual](#)
- [VA Programs HMIS Manual](#)
- [HUD-VASH Program HMIS Manual](#)
- [HOPWA Program HMIS Manual](#)



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CES - City Prior and Current Living Situation

- Effective June 1, 2026, CES will be utilizing the most updated [Current Living Situation Assessment \(CLSA\)](#) to reflect SPA on the Community Queue.
- The CLSA must have a geolocation selected for SPA changes to reflect the CES Participant's SPA.
- If a CLSA is not added, or if a geolocation is left blank, City Prior to CES Enrollment will be used to reflect the CES Participant's SPA.
- CES Access Points DO NOT NEED to update caseloads, unless the city in which the CES Participant is receiving CES services has changed.



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HMIS User Meeting Survey

The HMIS Team invites users to complete our HMIS User Meeting Survey. The feedback from the survey is used to select topics at our monthly user meetings.

We'd greatly appreciate any topics or ideas you're interested in reviewing in the upcoming monthly meetings.

Thank you!

Survey: <https://forms.gle/PMSQNVQsTyJih4ZQ9>



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Q&A

Reminder: Please enter your agency name in the chat box for attendance

Meeting materials and recording will be available on the [OC HMIS website](#)



**Thank you
Have a great day!**

Next User Meeting: July 1st





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